KeyAdvantage System
DMS Integration

Software User Manual

Supra
United Technologies

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Table of Contents

Preface 1
- Safety Terms and Symbols 1

Product Overview 2
- Minimum Software Requirements 2
- References and Related Documentation 2

Configuring Your DMS 3
- CDK Global 3
- Reynolds & Reynolds 3
- DealerTrack 3

Installation 4

Starting the KeyAdvantage DMS integration service 5

Adding, Modifying, and Deleting tasks 6
- Adding a Task 6
- Adding a Web API Task 7
- Modifying a Task 8
- Modifying a Web API Task 9
- Deleting a Task 10

Configuring Log Settings 11

Viewing the Import Log 12

Exporting and Importing Profiles 12
- Exporting Profiles 12
- Importing Profiles 12

Troubleshooting the DMS Integration Tool 13

Error Messages 14

Contacting us 15

Preface

This is the *KeyAdvantage DMS Integration Software User Manual* for use with KeyAdvantage in conjunction with the following Dealer Management Systems (DMS):

- CDK Global®
- DealerTrack®
- Reynolds & Reynolds®

This document includes an overview of the KeyAdvantage DMS Integration software, with detailed instructions explaining:

- how to configure the KeyAdvantage DMS integration tool for your DMS data;
- how to import and export data files; and
- how to add, modify, and delete tasks.

There is also information describing how to contact technical support if you have questions or concerns.

To use this document effectively, you should have the following minimum qualifications:

- a basic knowledge of Dealer Management Systems; and
- a basic knowledge of navigating within the MS Windows operating system.

Read these instructions and all other documentation entirely *before* installing or operating this product.

Note: A qualified service person, complying with all applicable codes, should perform all required hardware installation.

The following conventions are used in this document:

Bold	Menu items and buttons.
Italic	Emphasis of an instruction or point; special terms.
	File names, path names, windows, panes, tabs, fields, variables, and other GUI elements.
	Titles of books and various documents.
Blue italic	(Electronic version.) Hyperlinks to cross-references, related topics, and URL addresses.
`Monospace`	Text that displays on the computer screen.
	Programming or coding sequences

Safety Terms and Symbols

These terms may appear in this manual:

CAUTION: Cautions identify conditions or practices that may result in damage to the equipment or other property.

WARNING: Warnings identify conditions or practices that could result in equipment damage or serious personal injury.

Product Overview

The KeyAdvantage DMS integration tool provides automated updates to your KeyAdvantage database for all vehicle inventory data. Once you properly configure your DMS database (refer to *"Configuring Your DMS" on page 3*), it will export a file to a designated location whenever you make a change to the existing data. The tool detects changes to the data file, parses the file, and pushes the new data to your KeyAdvantage database, eliminating the need for manual entry of vehicle data into the KeyAdvantage system.

Minimum Software Requirements

Your operating system must have:

- Windows 10, Windows 8, or Windows 7
- Windows Server 2012 R2 (64-bit), Windows Server 2012, Windows Server 2008 R2 (32-bit), or Windows Server 2008

Visit *www.keyadvantage.com* to view KeyAdvantage documentation and download the current software.

References and Related Documentation

- *KeyAdvantage Software User Manual* (10092796P1-07)
- One of the following:
  - CDK Global® user manual
  - Reynolds & Reynolds® user manual
  - DealerTrack® user manual

Configuring Your DMS

Before the tool can begin making changes based on your DMS, configure the DMS to generate an inventory file in CSV format. Refer to the KeyAdvantage DMS Integration Software User Manual for more information to configure the CSV file. Contact your DMS company directly to help create the CSV file. As a second option, your DMS company may have an integration option with KeyAdvantage through the WebAPI feature.

CDK Global

For instructions to automatically integrate with CDK call 1-888-672-2140.

Reynolds & Reynolds

For instructions to import vehicle information from Reynolds & Reynolds, call 1-800-767-0080 or online at *https://my.reyrey.com.*

DealerTrack

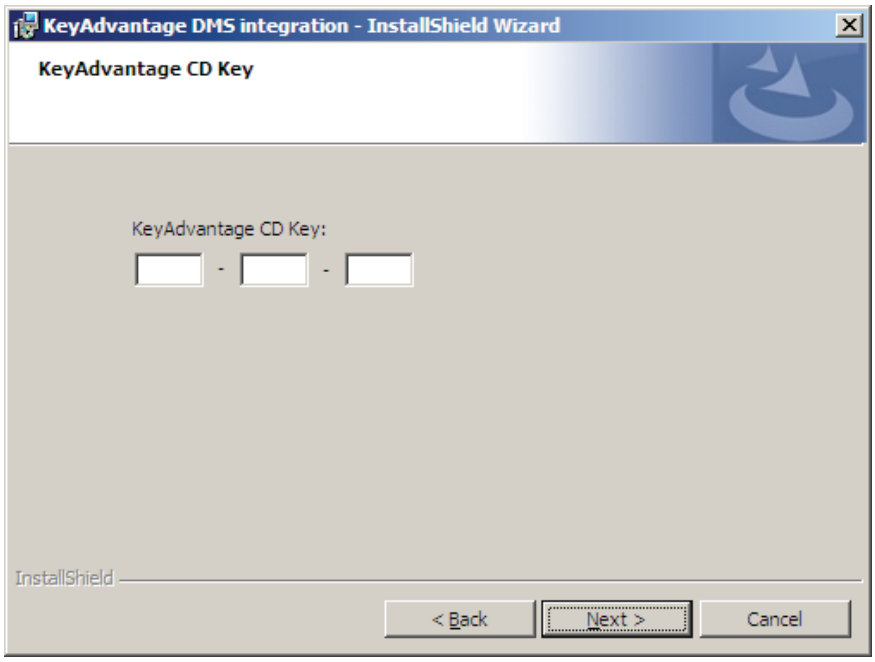
For instructions to import vehicle information from DealerTrack, call 1-877-357-8725.

Installation

To install the KeyAdvantage DMS integration tool, do the following:

1. Download the current software version from *www.keyadvantage.com.*
2. The InstallShield wizard welcome window displays. Click **Next**.
3. The *KeyAdvantageDMS License Agreement* window displays. Accept the terms and click **Next**.
4. The *KeyAdvantage CD Key* window displays (*"Figure 1"*). Type in your KeyAdvantage CD key. If you cannot find your KeyAdvantage CD key, call technical support.

Figure 1. KeyAdvantage CD Key Window



5. The *KeyAdvantage DB Server IP Address* window displays. If you have installed the program on the same server as KeyAdvantage, the IP address will autofill with the default address (*127.0.0.1*). If not, type the IP address of the server where you have installed KeyAdvantage and click **Next**.

Note: It's easiest to install the KeyAdvantage DMS tool on the same server running your KeyAdvantage software. You can install the tool on any other computer on the network. To do this, enter the IP address of KeyAdvantage in the installer screen.

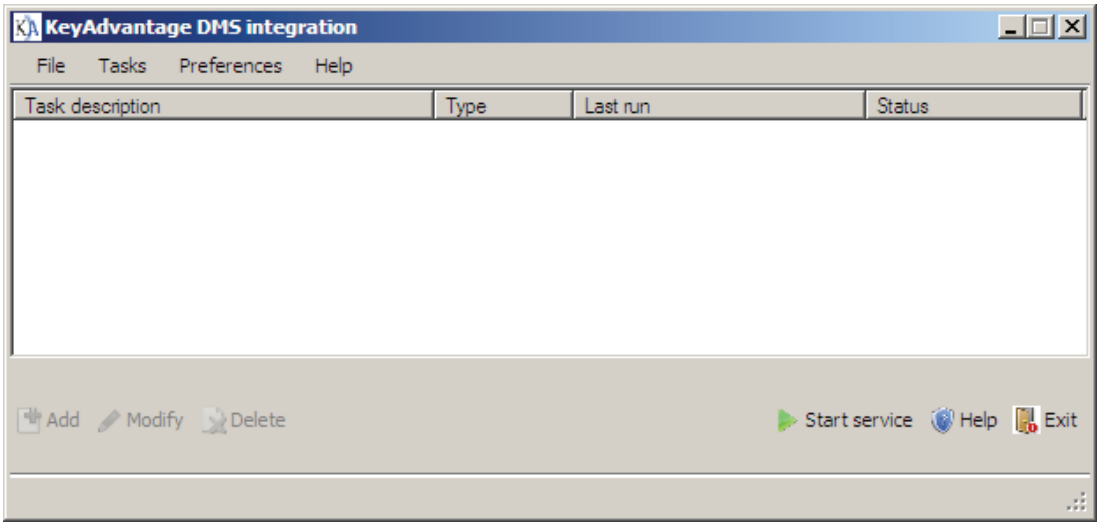
6. The *Destination Folder* window displays. To save the program to your PC, do one of the following:
   - To accept the default directory, click **Next**.
   - To alter the default directory where you save the program, click **Change**, browse to the desired directory, and click **Next**.
7. Click **Install**. The *Installing KeyAdvantage DMS* progress window displays.
8. Once the program completes installation, click **Finish**.

Starting the KeyAdvantage DMS integration service

In order for the tool to perform its recurrent tasks, you must open the application and start the service. To start the integration service the DMS integration software, do the following:

1. From the Windows *Start* menu, select **Programs** > **Supra** > **KeyAdvantage DMS integration**. The *KeyAdvantage DMS integration* window displays (*"Figure 2"*).

Figure 2. The KeyAdvantage DMS Integration Window



2. Click **Start service**.The service begins running and *Start service* changes to *Stop servic*e.

In general, you will leave the service running continuously. Even when you minimize the integration window or click **Exit**, the service will continue to run in the background unless you manually stop it. Additionally, if you close or minimize the window, the application will continue to run in the background as a tray icon. The only time you might want to stop the service is when moving KeyAdvantage to another server.

Adding, Modifying, and Deleting tasks

The DMS tool makes changes from your DMS to KeyAdvantage by user-defined tasks. Once you create a task, it will work continuously as designed unless you stop the service or you modify or delete the task.

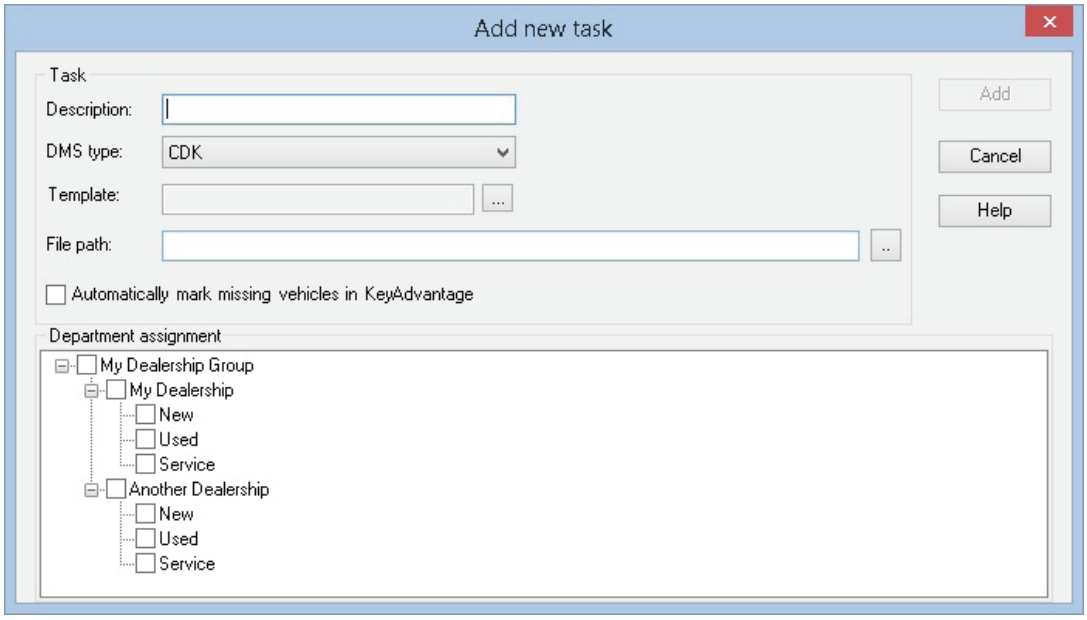
Adding a Task

Complete the following steps to add a new task to the KeyAdvantage DMS integration tool.

1. From the *KeyAdvantage DMS Integration* window, do one of the following:
   - Select **Add** from the *Tasks* menu.
   - Click the **Add** button.
   - Right-click and select **Add** from the popup menu.

   The *Add New Task* window displays (*"Figure 3"*).

Figure 3. Add New Task Window



2. Type a descriptive name for the new task in the *Description* text box.
3. From the *DMS Type* dropdown, select the system that your dealership uses.
4. To define the file path where the tool should look for the CSV file generated by your DMS, click **Browse**.
5. Navigate to the location of the CSV file and click **Save**.

Note: KeyAdvantage does not automatically delete vehicles that you have deleted from your DMS. However, the *Automatically Mark All Missing Vehicles in KeyAdvantage* checkbox does designate as *Inactive* all vehicles that have been removed from the DMS. If a vehicle does not exist in the CSV file but still has a tag assigned to it, the DMS tool will list it in the log file.

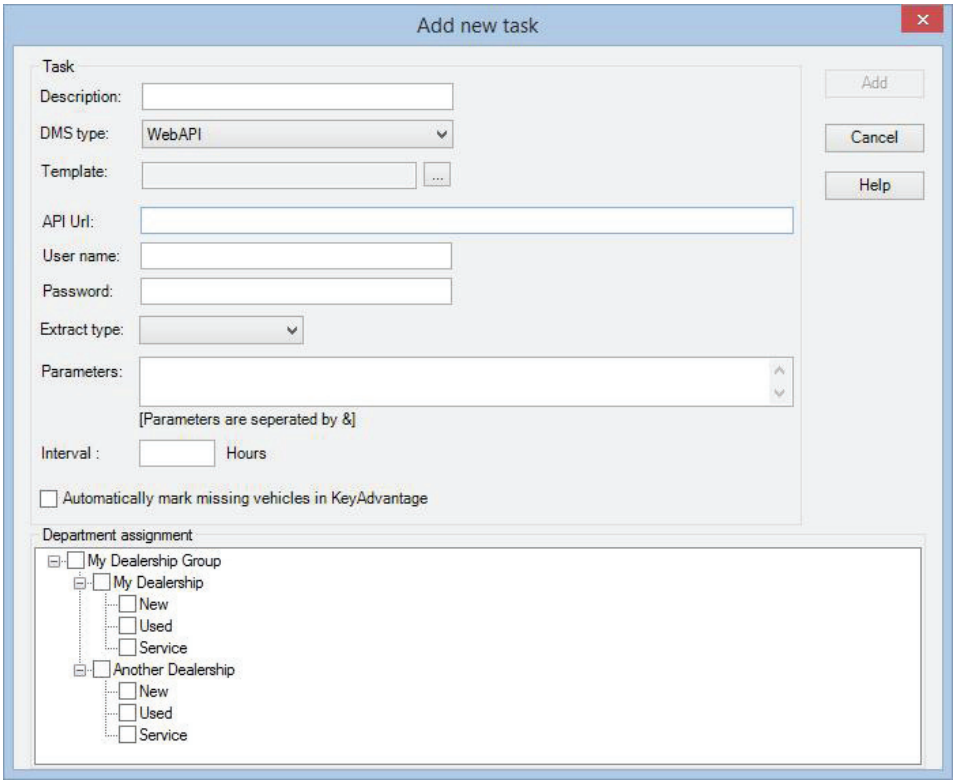
6. In the *Department* field, which is automatically populated from your KeyAdvantage database, select the department for the task. You can only select one department for each task.
7. Click **Add**.

Adding a Web API Task

Complete the following steps to add a new web API task to the KeyAdvantage DMS integration tool.

1. From the KeyAdvantage DMS Integration window, do one of the following:
   - Select Add from the Tasks menu.
   - Click the Add button.
   - Right-click and select Add from the popup menu. The Add New Task window displays (“Figure 4”).

Figure 4 Add New web API Task Window



2. Type a descriptive name for the new task in the Description text box.
3. From the DMS Type dropdown, select **WebAPI**.
4. Click **Browse** and select the template for the DMS type.
5. Type in the API Url provided by Supra.
6. Type in the user name and password provided by Supra.
7. Select from the Extract type dropdown.

Note: Bulk query will get all data from the DMS. Delta query will get only the newly changed data from the DMS.

- If your extract type is Bulk, use this parameter with your Dealer ID (provided by Supra) at the end: queryId=InventoryVehicles&dealerId=[Dealer Id] Example: queryId=InventoryVehicles&dealerId=3PAUXCDEV1
- If your extract type is Delta, use this parameter with your Dealer ID (provided by Supra) at the end: queryId=InventoryVehicles_Delta&deltaDate=[DateTime]&dealerId=[Dealer Id] Example: queryId=InventoryVehicles_Delta&deltaDate=[DateTime]&dealerId=3PAUXCDEV1

8. Add the interval hours.
9. In the *Department* field, which is automatically populated from your KeyAdvantage database, select the dealership or department for the task.

Note: You can only select one dealership or department for each task. If dealership is selected the vehicles will move to particular departmented mapped in template file. If department is selected all vehicles from API will move to selected department irrespective of vehicle type.

10. Click **Add**.

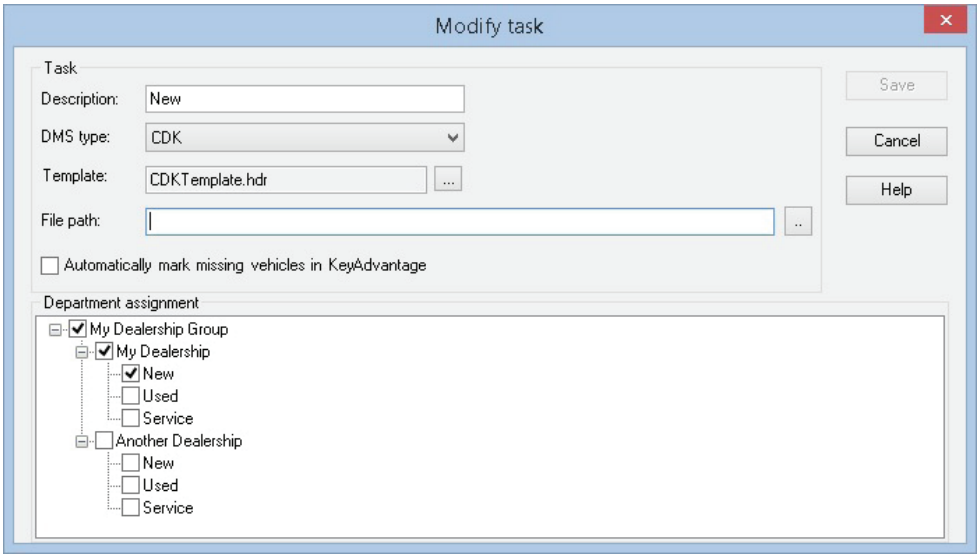
Modifying a Task

To modify a task, do the following:

1. From the *KeyAdvantage DMS Integration* window, select the task you intend to modify and do one of the following:
   - Select **Modify** from the *Tasks* menu.
   - Click the **Modify** button.
   - Right-click and select **Modify** from the popup menu.

   The *Modify Task* window displays (*"Figure 4"*), with information filled in for the task you have selected to modify.

Figure 4. Modify Task Window



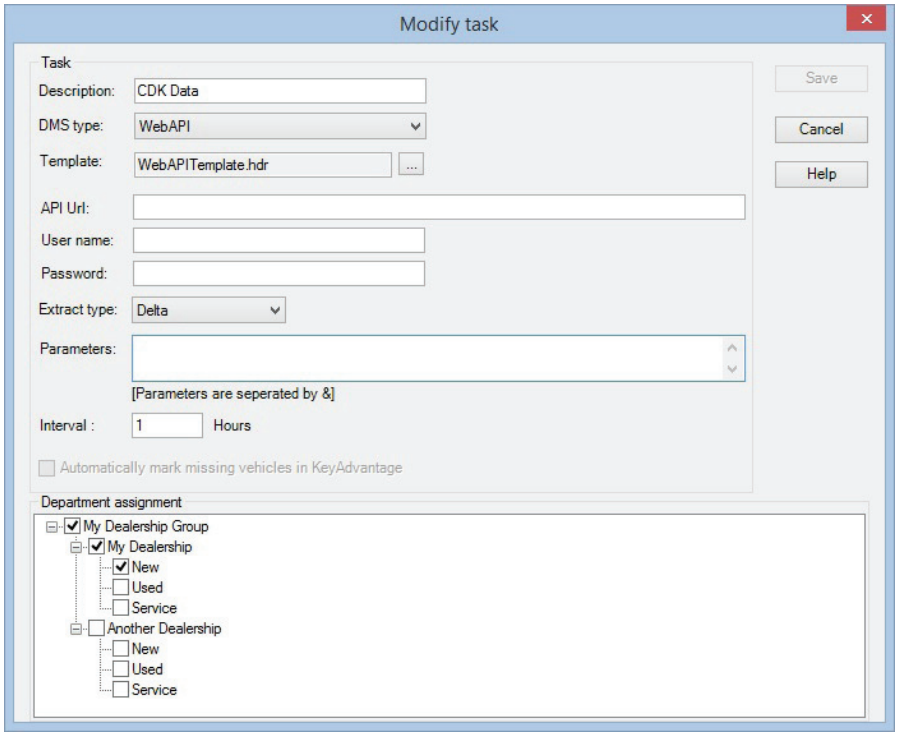
2. The *Modify Task* window allows you to change any of the following:
   - *Description*—You can alter the name of the task.
   - *DMS Type*—If your company changes Dealer Management Systems, you can change this selection.
   - *Template— You can choose the template for the task.*
   - *File Path*—You can revise the location where the tool should look for the DMS data file.
   - *Automatically Mark All Missing Vehicles in KeyAdvantage*—You can check or uncheck this option.
   - *Department Assignment*—You can change the department that is selected for the task.
3. When you have completed your changes, click **Save**.

Modifying a Web API Task

1. From the KeyAdvantage DMS Integration window, select the task you intend to modify and do one of the following:
   - Select Modify from the Tasks menu.
   - Click the Modify button.
   - Right-click and select Modify from the popup menu.

Note: The Modify Task window displays (“Figure 6”), with information filled in for the task you have selected to modify.

Figure 6. Modify WebAPI Task Window



2. The *Modify Task* window allows you to change any of the following:
   - Description—You can alter the name of the task.
   - DMS Type—If your company changes Dealer Management Systems, you can change this selection.
   - Template— You can choose the template for the task.
   - API Url— You can revise the DMS API Url.
   - User name and Password—You can change the user name and password.
   - Extract type— You can revise DMSi extracts data to your system.
   - Parameters— You can change the extract type parameters.
   - Interval— You can change how often DMSi runs the task.
   - Dealership / Department Assignment—You can change the dealership or department that is selected for the task.
3. When you have completed your changes, click **Save**.

Deleting a Task

To delete a task from the tool, do the following:

1. From the *KeyAdvantage DMS Integration* window, select the task you intend to delete and do one of the following:
   - Select **Delete** from the *Tasks* menu.
   - Click the **Delete** button.
   - Right-click and select **Delete** from the popup menu.
2. A dialog will display asking if you are sure you want to delete the selected task. Click **Yes**.

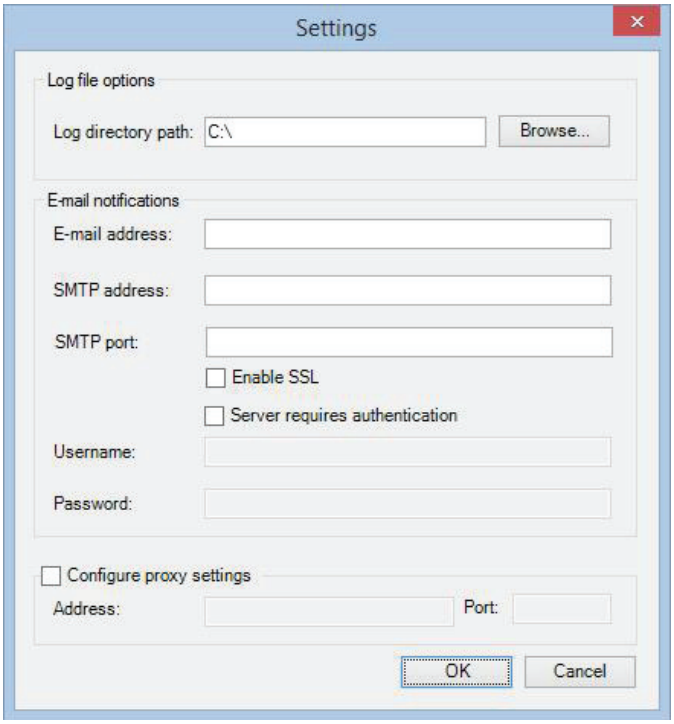
Configuring Log Settings

The log setting feature allows you to designate the recipient of an e-mail outlining any exceptions or critical errors that occur as the tool's service is running. The DMS toll will apply these log setting preferences to every task listed in the *Task Description* field of the *Key DMS* window. For a description of the various errors you may encounter, refer to *"Troubleshooting the DMS Integration Tool" on page 13*.

To set your log setting preferences, do the following:

1. From the *Preferences* menu of the *KeyAdvantage DMS Integration* window, click **Log settings**. The *Log Settings* window displays (*"Figure 5"*).

Figure 5. Log Settings Window



2. To define the log directory where the tool will store the log file, navigate to the appropriate folder and click **Save**. You can also enter the directory name and, if the directory does not currently exist on your system, the DMS integration tool will create it for you.
3. In the *E-mail address* text box, type the e-mail address of the intended recipient of the log file.
4. In the *SMTP address* text box, enter the recipient's SMTP address, which you can retrieve from your IT administrator, Internet provider, or by looking in the recipient's MS Outlook account settings. (Refer to the *Change your email server address* topic at *Microsoft Office Outlook help*.)
5. If your recipient's server requires authentication in order to allow receipt of the log e-mail, do the following:
   a. Select the *Server Requires Authentication* checkbox.
   b. In the *Username* box, enter the recipient's user name.
   c. In the *Password* box, enter the recipient's password.
6. Check the Configure proxy settings checkbox to set the proxy address if the system requires a proxy address to connect to Internet.
7. Click **OK**.

Viewing the Import Log

The import log displays information about tasks your system has run, including any errors that occur. For further information about various error messages presented by the tool, refer to *"Troubleshooting the DMS Integration Tool" on page 13*.

To view the import log, from the *KeyAdvantage DMS Integration* window, right-click in the list of tasks and select **View Import Log** from the popup menu.

Exporting and Importing Profiles

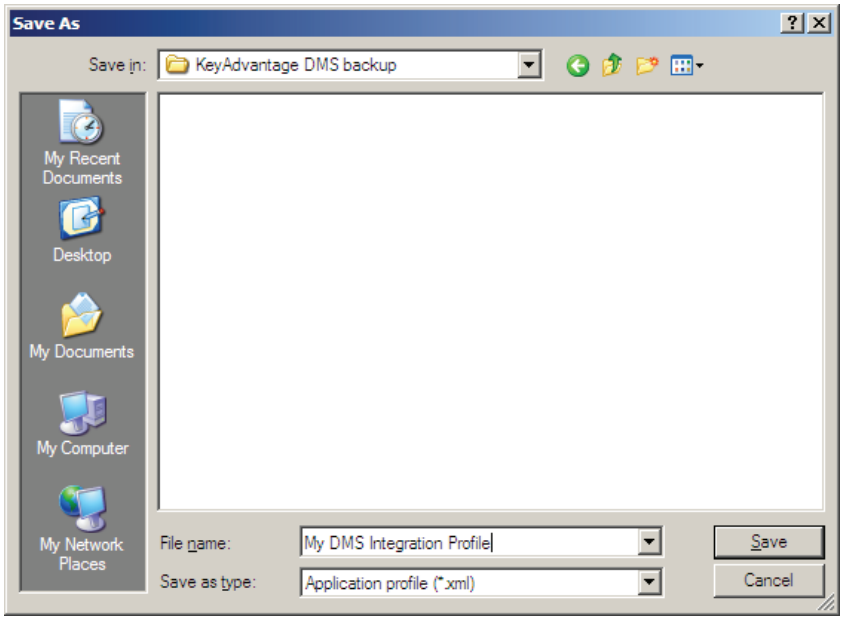
Exporting profiles allows you to save all of your tasks and other user preferences to an external file as a backup. The *Import* function allows you to import these backup settings into the tool from the external file.

Exporting Profiles

To export profiles, do the following:

1. In the *KeyAdvantage DMS Integration* window, select **File** > **Export** profile. The *Save As* window displays (*"Figure 6"*).

Figure 6. Naming the exported file



2. Enter a descriptive name for your profile and click **Save**. You can navigate to the folder where you saved this file to confirm that a backup file, in XML format, has been created in that location.

Importing Profiles

You must have previously exported a profile (refer to *"Exporting Profiles" on page 12*) in order to use the import feature. To import profiles, do the following:

1. In the *KeyAdvantage DMS Integration* window, select **File** > **Import profile**.
2. By default, the program should open the folder where you previously saved the export file. If not, navigate to the correct folder.
3. Either double-click the saved XML file, or select it and click **Open** to import your saved profile into the tool.

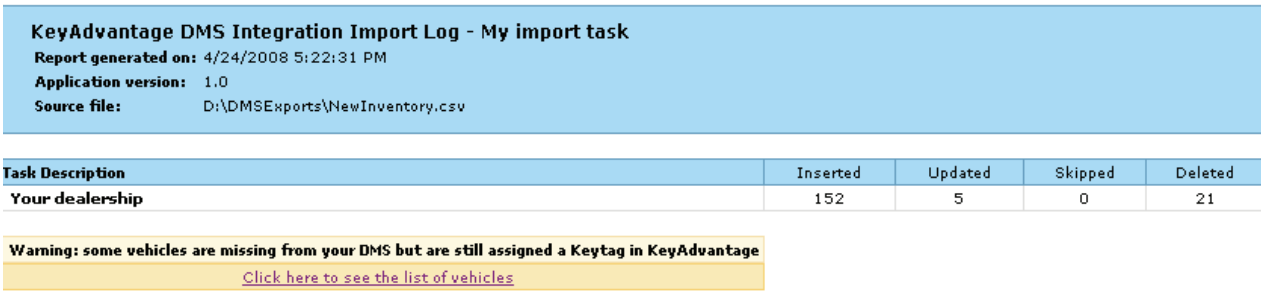
Troubleshooting the DMS Integration Tool

When the DMS integration tool imports new data, it generates an import log file. You can view the log file (refer to *"Viewing the Import Log" on page 12*) to determine if the import has succeeded or failed. If the import fails, you can determine the possible cause by reviewing *"Table 1" on page 14*.

- *How do I know the import has been successful?*

  Check the log file (refer to *"Viewing the Import Log" on page 12*). A successful import will indicate the number of vehicles inserted, updated, skipped, and deleted (*"Figure 7"*). If the import is unsuccessful, a failure description will appear (*"Figure 9"*).

Figure 7. Log File of a Successful File Import



KeyAdvantage DMS Integration Import Log - My import task

Report generated on: 4/24/2008 5:22:31 PM
Application version: 1.0
Source file: D:\DMSExports\NewInventory.csv

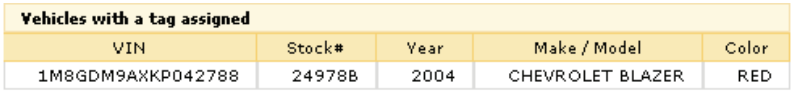
Task Description	Inserted	Updated	Skipped	Deleted
Your dealership	152	5	0	21

Warning: some vehicles are missing from your DMS but are still assigned a Keytag in KeyAdvantage

Click here to see the list of vehicles

Additionally, you can click the link (at the bottom of the window) which will open a display with a list of vehicles that have a tag assigned in KeyAdvantage, but which no longer appear in the DMS (*"Figure 8"*).

Figure 8. List of Vehicles with a Tag Assigned



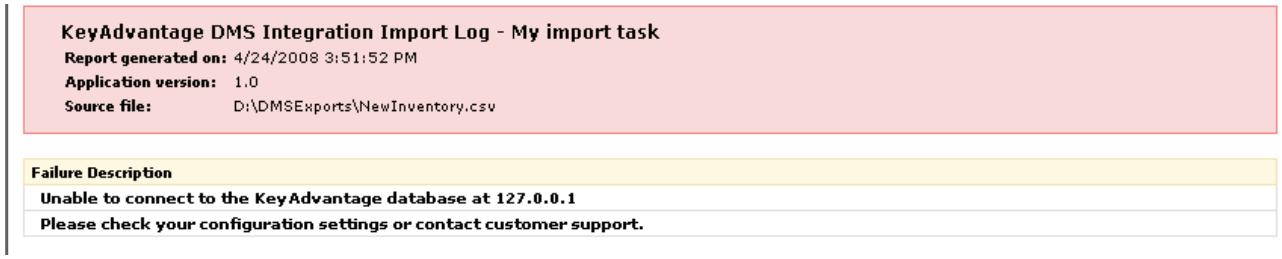
Vehicles with a tag assigned

VIN	Stock#	Year	Make / Model	Color
1M8GDM9AXKP042788	24978B	2004	CHEVROLET BLAZER	RED

- *What do I do if the log file indicates errors in the file import?*

  Any errors that occur during the file import will be indicated by the *Failure Description* list (*"Figure 9"*). In order to troubleshoot these errors, refer to *"Error Messages" on page 14*.

Figure 9. Log File with Errors During File Import



KeyAdvantage DMS Integration Import Log - My import task

Report generated on: 4/24/2008 3:51:52 PM
Application version: 1.0
Source file: D:\DMSExports\NewInventory.csv

Failure Description
Unable to connect to the KeyAdvantage database at 127.0.0.1
Please check your configuration settings or contact customer support.

Error Messages

The following table lists some of the most common error messages and their causes.

Table 1. KeyAdvantage DMS Integration Error Messages

Error message	*Logged*	*E-mailed*	*Type*	*Possible cause*
Unable to connect to the KeyAdvantage database at <*ip_address*>.	Yes	No	Message box	• KeyAdvantage database server is down. • KeyAdvantage database server is unreachable. • Authentication failure causes an error while logging on to the database.
Error connecting to database while trying to import records.	Yes	Yes	Log file	• KeyAdvantage database server is down. • KeyAdvantage database server is unreachable. • Authentication failure causes an error while logging on to the database.
Service failed to start. Please review log file for details.	Yes	No	Message box	Internal unexpected error in the service. Call customer support.
Service failed to stop. Please review log file for details.	Yes	No	Message box	Internal unexpected error in the service. Call customer support.
Service communication error. Please see log file for details.	Yes	No	Message box	An error in the application GUI. Attempt to restart the application. If the problem persists, contact customer support.
Internal error. Please contact customer support.	Yes	Yes	Message box	Internal application failure.
The file provided does not include a valid profile.	Yes	No	Message box	Attempting to import a file not exported by the tool, or a file that is corrupt.
The service shut down unexpectedly.	Yes	Yes	Log file/ message box	Internal error in the service.
Invalid DMS inventory file.	Yes	No	Log file	The DMS exported file is corrupt.
Unable to add task. Please verify that the file path specified is accessible by the KeyAdvantage DMS system service.	No	No	Message box	Cannot map directly to a network drive. You must enter the entire file path.
The remote server returned an error: (401) Unauthorized. Authorization Failed	Yes	No	Log file	Below API details may be incorrect. 1. User name 2. Password 3. Parameters
The remote server returned an error: (401) Unauthorized. Dealer is not subscribed to adp3pa.pip.vehicle-extract. standard.endpoint	Yes	No	Log file	Dealer is inactive in CDK PIP. Please contact customer support.
The remote name could not be resolved: '3pa. dmotorworks.com'	Yes	No	Log file	Proxy has to be configured from Settings>Configure proxy.
Unable to connect to server	Yeas	No	Log file	Check the CDK service available or not. Please contact customer support.

Contacting us

For help installing, operating, maintaining, and troubleshooting this product, refer to this document and any other documentation provided. If you still have questions, contact us 5 a.m. to 7 p.m., seven days a week (excluding holidays).

Table 2. Technical support

Website	*http://www.keyadvantage.com*
E-mail	suprasupport@fs.utc.com
Telephone	1-866-259-8077
Fax	503-589-8677

Note: Be ready with the equipment before calling.